Participant Materials

The Linkage, Inc. Management & Leadership Series

Creating a World-Class Organization

Featuring Ken Blanchard



LINKAGE INCORPORATED

Creating a World-Class Organization

Table of Contents

SECTION 1

Satellite Program Materials

Introduction

Welcome to *The 2000 Linkage Management & Leadership Series*. This distance learning seminar series will introduce you to one of the world's outstanding thinkers in the area of management and leadership. Participating in these seminars will help you develop the skills you need to be an innovative and successful leader. Some of the areas covered in today's program include: leading organizational change, creating world-class organizations and identifying the defining moments of successful leaders.

Today's program, "Creating a World-Class Organization," features Ken Blanchard. Ken is a widely recognized thinker in developing and teaching individuals useful management tools to increase productivity and morale in their organizations. You will hear Ken discuss how to achieve leadership excellence and develop high performing organizations. Specifically, the program provides insight on these competencies:

- Focused drive
- Trusted influence
    - Commitment
    - Empowerment
- Coaching/Mentoring

Ken Blanchard is the Chief Spiritual Officer of the Ken Blanchard Companies. He founded his management training and consulting company with his wife Marjorie. He is co-author of many best selling books including: *One Minute Manager, Gung Ho!, Raving Fans* and his most recent, *Leadership by the Book*. Ken is a visiting lecturer at Cornell University where he is a trustee emeritus of the Board of Trustees. He is also the founder of the Center for Faithwalk Leadership.

During today's program Ken teaches you how to create a high performing organization that knows how to "S.C.O.R.E." He identifies the elements of the S.C.O.R.E. acronym and teaches you how to implement these elements.

The high performing organization Ken describes also knows how to hit the "Target". This "Target" helps you identify and develop a vision of excellence on which to build the goals for your organization.

You will learn the secrets of a Gung Ho! organization that will send your people "Soaring." Ken will teach you the steps you need to help you turn your organization into one that is "Gung Ho!" Ken also discusses his model of Situational Leadership® II and describes how you can use it to develop yourself and your teams.

By describing real life examples of the successful implementation of these approaches, Ken helps you see how to apply them to produce outstanding results in your own organization.

These Participant Materials have been designed to complement Ken Blanchard's presentation. Use them to augment or supplement the presentation and to take notes. At the end of the presentation you will be able to submit questions to ask Ken.

Learning is a mental activity that requires more than passively watching a speaker. Simply watching today's program will not enable you to use the leadership skills and knowledge or initiate an immediate change in your organization's culture.

Achieving leadership excellence in the current business environment requires practice and follow-through, as well as reflection. Use the Pre-presentation activities on page 4 and the reinforcement Post-presentation activities on page 25 to further your learning. These activities will broaden and deepen your personal knowledge as well as give you a start in building a culture that knows how to "S.C.O.R.E" and hit the "Target" and "Soar."

What you will learn

By participating in today's program with Ken Blanchard you will learn to:

- Understand the importance of managing the present while preparing for the future
- Develop skills in the three aspects (secrets) of managing people's performance
- Recognize the five characteristics of effective organizations
- Empower employees in a high performance culture

Pre-presentation activities

- Read and/or review the following books written by Ken Blanchard:
  - *Leadership and The One Minute Manager*: (with Patricia Zigarmi and Drea Zigarmi), 1985
  - *Gung Ho!*: Ken Blanchard and Sheldon Bowles, NY: William Morrow and Company Inc., 1998.
- Take time to read *Section I: Satellite Program Materials* prior to attending the program. Familiarizing yourself with the materials and information Ken Blanchard covers in the televised portion of the program will enhance your learning experience.

Pre-presentation activities (continued)

Define each of the following terms or concepts in your own words. Ken Blanchard will use these terms and concepts during the presentation.

- Organizations that know how to S.C.O.R.E. – take your best guess as to what the letters in this acronym stand for.

- What "Target" does your organization aim to hit? Identify several components of this "Target."

- Gung Ho!

- The Spirit of the Squirrel

- The Way of the Beaver

- The Gift of the Goose

- Situational Leadership® II

Complete the Leadership Assessment Instrument™ (LAI) which appears in Section 2 beginning on page 26. The LAI was researched and developed by Linkage, Inc., in partnership with Dr. Warren Bennis. It focuses on the five personal characteristics, or competencies, essential to effective leadership and on the five skills leaders use to put these competencies into practice. Knowing your strengths and opportunities for development may help make today's presentation particularly relevant.

Focus on those competency areas and leadership skills identified in the introduction as Ken Blanchard gives his presentation.

During this program

- Participate! Actively follow along by using these Participant Materials for your notes. Think about ways that you will be able to use the ideas and skills presented by Ken Blanchard.
- Submit your questions for Ken Blanchard during the question and answer session. Ken will respond to questions in the latter third of the program. To submit questions, complete either the fax form found on page 58, or call in when prompted during the program.

Today's Program

Today's program presented by Ken Blanchard is designed to present you with a variety of ideas, skills and approaches to achieve leadership excellence and create a high performing organization. Using examples of companies that have utilized these approaches, Ken teaches you the secrets he has learned over his career. He presents you with steps to implement and to improve your leadership effectiveness. An effective leader builds an empowered organization capable of achieving its business objectives.

While the lessons Ken presents appear simple and straightforward, they embody tested wisdom of successful practice. Ken begins by describing the "Target" worth working toward. This target includes the goals of being the:

- Provider of choice with "Raving Fan Customers"
- Employer of choice full of "Gung Ho! People"
- Investment of choice able to attract the "Big Bucks."

Ken tells you how to achieve these worthwhile goals. He uses an acronym he calls S.C.O.R.E. to illustrate what needs to be accomplished. The letters of the acronym stand for:

- S – Shared Power
- C – Compelling vision
- O – On-going learning
- R – Relentless focus on customer results
- E – Energizing structure and systems

During his talk Ken discusses each of these points and gives you ideas on how to create an organization that embodies and enacts these values.

The three Gung Ho! secrets Ken teaches you today are lessons he presented in the book he co-authored with Sheldon Bowles titled *Gung Ho!*. In this book, Ken describes an inspirational story of business leaders who used these simple lessons to transform an organization from one ready to be closed down to one that won national recognition for its practices. Today you will learn how to apply the following lessons:

- The Spirit of the Squirrel
- The Way of the Beaver
- The Gift of the Goose

In addition, Ken developed a model of leadership that he calls "Situational Leadership® II." Today Ken explain you how to apply this model to your own leadership work in order to become more effective in assisting your teams to work better.

Taken together, these ideas and approaches will help you to achieve leadership excellence and lead an organization that “Soars.”

Ken Blanchard will begin his presentation by discussing the difficulty of staying competitive in a rapidly changing technological world. The key to achieving this difficult task involves empowering people to do what they do best.

Being successful requires both managing the present while simultaneously planning for the future. Organizations can achieve this by freeing the visionaries to work on designing and envisioning the future. At the same, time being successful requires doing the current work well. This means empowering those employees with the resources and support they need to do their jobs.

Take notes below while Ken describes the skills needed to create the future while supporting the present.

High performing organizations of today and tomorrow will be those that know how to "S.C.O.R.E." and can hit the "Target."

Take notes below as Ken describes the three critical elements of the "Target."

What is the "Target?" The "Target" involves being the:

- **Provider of choice** who develops **"Raving Fan Customers"**

- **Employer of choice** who encourages **"Gung Ho! People"**

- **Investment of choice** that attracts the **"Big Bucks"**

Now that you have identified the "Target," how do you achieve these goals? You do this by learning how to S.C.O.R.E.

Take notes below while Ken Blanchard tells you how to S.C.O.R.E.!

S. C. O. R. E.

- **S.** *Shared Power*
- **C.** *Compelling Vision*
- **O.** *On-going Learning*
- **R.** *Relentless Focus on Customer Results*
- **E.** *Energizing Structure and Systems*

Next Ken Blanchard will discuss three secrets, that when unlocked and put into action, will send your people's energy *Soaring.* Enacting these practices will help you develop an organization full of **Gung Ho!** people.

Take notes below as Ken describes the **Gung Ho!** Story.

Gung Ho!

Ken describes the first Gung Ho! secret.

Secret Number One: The Spirit of the Squirrel – Worthwhile Work!

From a positive perspective, all of us perform worthwhile work we can take great pride in. If we view all of our employees as performing this kind of work and imbue the entire organization with the belief that everyone performs worthwhile work, people will feel empowered to do their best.

Take notes below while Ken discusses this first secret.

Gung Ho! – The Spirit of the Squirrel

Ken described the first secret of Gung Ho! as The Spirit of the Squirrel. This secret highlights the necessity of individuals feeling that their work is worthwhile and important. People are critical to an organization's success and they need to understand the unique role that they contribute. This kind of empowerment helps to build self-esteem in employees. This secret addresses the needs of society.

The following are guidelines for enabling **The Spirit of the Squirrel**:

The Spirit of the Squirrel

- Knowing that we make the world a better place through our work

- Everyone works toward a shared goal

- Values guide all plans, decisions, and actions

Gung Ho! – The Way of the Beaver

Next Ken describes secret number two – The Way of the Beaver. The Way of the Beaver teaches people to be *"In Control of Achieving the Goal!"*

Secret Number Two: The Way of the Beaver - In Control of Achieving the Goal

Beavers work in a group to accomplish a common goal. However, no one tells each individual animal how to perform his or her job. The assumption is that each beaver is individually best situated to assess how he or she can most effectively contribute to the team effort.

Take notes below as Ken elaborates on this concept.

Gung Ho! – The Way of the Beaver

The second secret – **The Way of the Beaver** addresses the needs of the individual. It describes the individual's relationship to the organization as well as the organization's relationship to the individual.

Operationalizing **The Way of the Beaver** can serve as an organization's "Golden Rule" for management behavior.

Take notes as Ken Blanchard describes the various aspects of secret number two.

Secret Number Two: The Way of the Beaver

- A playing field with clearly marked territory

- Thoughts, feelings, needs and dreams are respected, listened to and acted upon

- Able but challenged (developing agreed upon stretch goals)

Gung Ho! – Achieving a Balance Between Being Responsive and Responsible

The first part of achieving The Way of the Beaver is to have a clearly marked territory in which you have the freedom and responsibility to do your job the best way you see fit. The job of management is to help establish the boundaries by developing and communicating the vision and mission of where the organization is headed. The leadership is responsible for creating the goals and the mission. The employees are responsive to that mission. In the first diagram Ken describes the jobs of the different levels of the organization.

After the vision is described and the mission is clear, the pyramid is tipped over as in Diagram 2. Now it is the job of leadership to be responsive and support the mission. They must mark the territory empowering employees to be responsive in carrying out their tasks.

Take notes below as Ken discusses this concept.

Diagram 1:

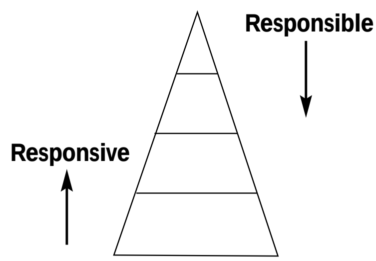
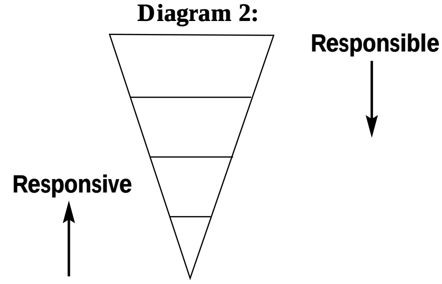


Diagram 2:

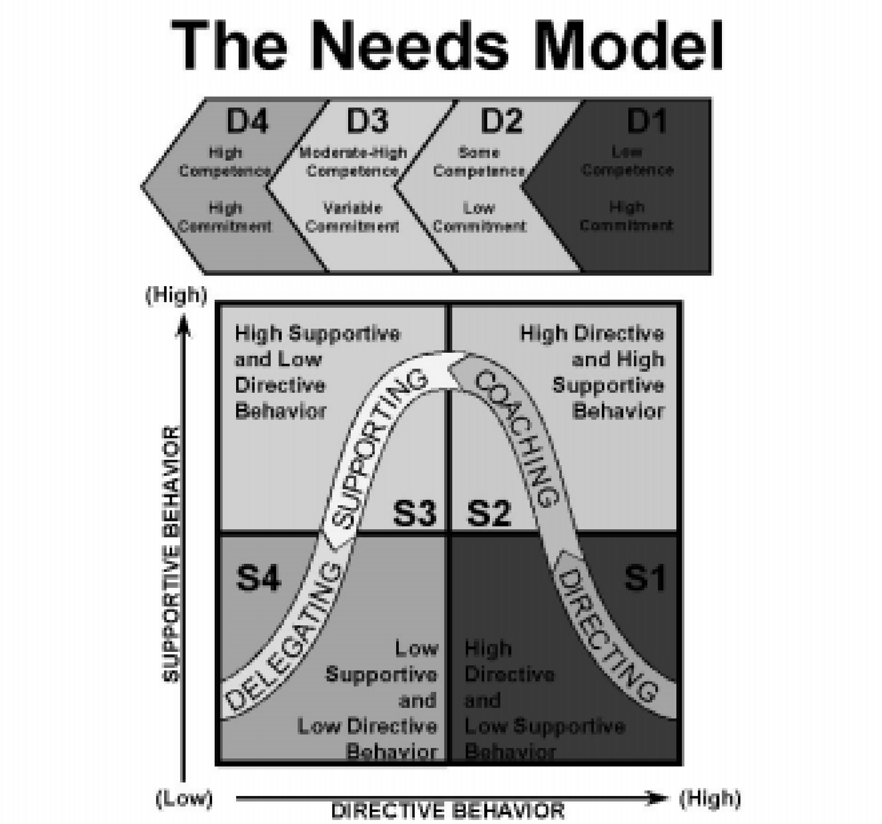


Next, Ken discusses a leadership model that he developed called “Situational Leadership.” Ken will first describe this model as it applies to the leader.



Use this space below to take notes as Ken describes “Situational Leadership®”

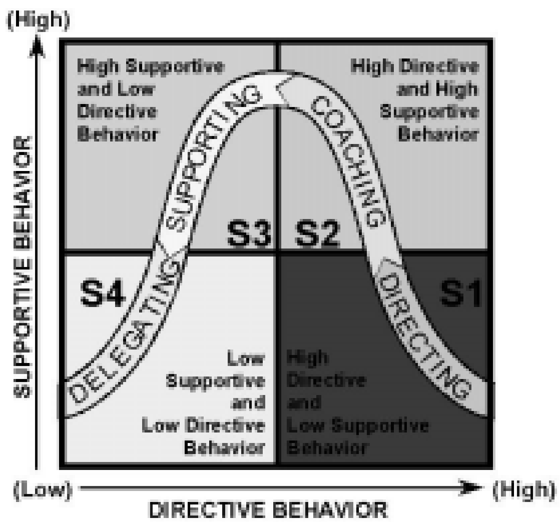
Next Ken describes how Situational Leadership® II applies to the follower. This version of the model helps you to determine your leadership behavior depending on an individual's competence and level of commitment for a particular project or task.



Take notes below as Ken describes *The Needs Model* aspect of Situational Leadership.

In this part of the presentation Ken shows you how to apply the concepts of the Situational Leadership® II model to the Stages of Group Development. You will learn how to utilize this approach to develop and lead high performing teams.

Situational Leadership® II And The Stages Of Group Development



Use the space below to take notes as Ken discusses Situational Leadership® II and the Stages of Group Development.

Gung Ho! – The Gift of the Goose

Ken describes secret number three – The Gift of the Goose. Like the other secrets, this one may seem simple at first. But, like the other two, it is extremely powerful when implemented. The Gift of the Goose involves “Cheering Each Other On!”

In most organizations, individuals will be presented with many opportunities to focus on past problems and to allocate blame. Although just as abundant, it is often times more challengeing for individuals to capitalize on opportunities to cheer each other on and congratulate both the progress and the end result. Celebrating efforts and accomplishments are powerful tools in developing high performing organizations.

Secret Number Three: The Gift of the Goose - Cheering Each Other On!

The secret of The Gift of the Goose involves a basic human need – that of being cheered on and encouraged. The Gift of the Goose is the gift we give to each other.

The following are guidelines and suggestions for implementing The Gift of the Goose in your organization:

Take notes as Ken describes secret number three – The Gift of the Goose.

The Gift of the Goose

- Active or passive, congratulations must be TRUE

- No score, no game, cheer the progress

- $E = MC^2$ – Enthusiasm equals mission times cash and congratulations

Having shared Ken's discussion you now have the knowledge and ideas to begin to achieve leadership excellence. You can hit the Target and S.C.O.R.E. with Gung Ho! people!

Take notes in the space below as Ken makes his final remarks.

Wrap up

You have spent the past hour and a half learning first-hand about to Ken's approach to developing a high performing organization. Organizations, Ken says, need to know the S.C.O.R.E. and hit the "Target." The Target consists of three goals to which organizations should aspire.

- Provider of Choice that produces Raving Fan Customers
- Employer of Choice full of Gung Ho! people
- Investment of Choice attracting the Big Bucks.

Organizations hit this "Target" by knowing how to S.C.O.R.E. This acronym embodies the behaviors and values that employees need to accomplish their goals. The first of these values involves a sense of shared power throughout the organization. Developing a compelling vision and having an environment that supports on-going learning are also important aspects of the process that Ken described. Finally, this model illustrates that organizations that learn to S.C.O.R.E. have a relentless focus on customer results.

In the next portion of his presentation, Ken reveals three secrets that can help organizations develop Gung Ho! workers. These secrets include a variety of leadership approaches and behaviors that energize and motivate people to do their best work. People who are Gung Ho! workers feel good about themselves and feel that their work is valued.

Ken also discusses his Situational Leadership® II model. His goal was to demonstrate how to apply this model to your role as a leader with individuals and in work with teams.

Putting all the elements of this presentation together and practicing the skills that Ken Blanchard teaches will help you, in Ken's words, achieve leadership excellence, lead high performing organizations with Gung Ho! individuals who hit the "Target" and S.C.O.R.E.

When the session has concluded…

- Turn to the end of these materials. Complete the Participant Evaluation Form on page 59 and return it to your Site Coordinator.
- Your feedback is integral to ensuring the integrity of this and future programs. We take pride in providing relevant, thought-provoking, and enlightening programs. But we rely on your help to make it happen!
- Take a few minutes to check your understanding of the key points presented during the session. Turn to the Self-Check on page 23 and compare your responses to those provided following the quiz.
- To further reinforce your understanding of today's content, as well as hone other aspects of your leadership skills, complete the suggested Post-presentation activities on page 25.

Self-Check

Complete the following Self-Check instrument to review your learning from Ken Blanchard's presentation "Creating a World-Class Organization."

Fill in the Blanks:

1. To stay competitive leaders need to simultaneously manage the _______________ and plan for the _____________.

2. Ken discussed three elements that are important for organizations to Hit the Target.
   - ____________________ of Choice/ Raving Fan Customers
   - ____________________ of Choice/ Gung Ho! People
   - ____________________ of Choice/ Big Bucks

3. Complete the following parts of the S.C.O.R.E. acronym.
   - Shared ______________
   - Compelling ___________
   - On-going ____________
   - Relentless focus on ________________ _________________
   - Energizing ____________ and _______________

4. Developing Gung Ho! people requires unlocking three secrets.
   - The Spirit of the Squirrel – Worthwhile ______________
   - The Way of the Beaver – In Control of Achieving the ____________
   - The Gift of the Goose – ______________ Each Other On

5. The Four Situational Leadership activities include:
   - ______________________
   - ______________________
   - ______________________
   - ______________________

Self-Check Key

The following are the answers to the Self-Check quiz you just completed. See how successful you were.

1. To stay competitive leaders need to simultaneously manage the present and plan for the future.

2. Ken discussed three elements that are important for organizations to Hit the "Target".
   - Provider of Choice/ Raving Fan Customers
   - Employer of Choice/ Gung Ho! People
   - Investment of Choice/ Big Bucks

3. Complete the following parts of the S.C.O.R.E. acronym.
   - Shared Power
   - Compelling Vision
   - On-going Learning
   - Relentless focus on Customer Results
   - Energizing Structure and Systems

4. Developing Gung Ho! people requires unlocking three secrets.
   - The Spirit of the Squirrel – Worthwhile Work
   - The Way of the Beaver – In Control of Achieving the Goal
   - The Gift of the Goose – Cheering Each Other On

5. The four Situational Leadership activities include:
   - Delegating
   - Supporting
   - Coaching
   - Directing

Post-Presentation Activities

1. Return to the Pre-presentation activities and review your responses to the words and phrases you were asked to define. Consider how you would change some of your responses following the presentation by Ken Blanchard.

2. Read an article or book written by Ken Blanchard.

3. Share the three secrets of Gung Ho! leadership with a colleague.

4. Develop an action plan to implement these three sets of practices in your part of the organization.

5. Review the S.C.O.R.E. elements with your supervisor and develop a plan to put 1-2 of these ideas into action.

6. Consider how you might make use of the Situational Leadership® II model in your own work with individuals and teams.

SECTION 2

The Leadership Assessment Instrument™

About the Leadership Assessment Instrument™

The Leadership Assessment Instrument™ (LAI) was researched and developed by Linkage, Inc., in partnership with Dr. Warren Bennis. It focuses on the five personal characteristics, or competencies, essential to effective leadership and on the five skills with which leaders put these competencies into practice. Knowing your strengths and opportunities for development may help make today's presentation particularly relevant.

The five categories the instrument assesses are:

1. Focused drive
2. Emotional intelligence
3. Building trust/enabling others
4. Conceptual thinking
5. Systems thinking

Each competency and each skill has a definition and an associated set of behaviors that demonstrate that competency or skill. Additionally, each competency is described by ten of these behaviors and each skill by five. Furthermore, the ten behaviors for each competency are organized into two groups of five, each corresponding to a component of that competency.

Let's take a closer look at the five competency categories in greater detail.

Focused Drive

The competency of focusing on a goal and harnessing your energy in order to meet that goal—a balance between the components of:

- Focus: The ability to identify an important goal or vision and to channel efforts at specific targets that support that goal or vision.
- Drive: The ability to persevere, sacrifice (when necessary), and expend high degrees of energy to reach high levels of performance.

Emotional Intelligence

The competency of understanding and mastering your emotions (and those of others) in a way that instills confidence, motivates, inspires, and enhances group effectiveness—a balance between the components of:

- Perception: The ability to read the emotions and thoughts of others through the use of insight and analytical skills.
- Emotional Maturity: The ability to master emotions and cope with stress in a way that instills confidence, motivates, and enhances group effectiveness.

Trusted Influence

The competency of evoking trust from others and placing trust in others to enable them to succeed—a balance between the components of:

- Commitment: The ability to evoke trust from others by keeping commitments, adhering to high ethical standards and principles, and building shared goals or values.
- Empowerment: The ability to help others reach higher levels of performance through trust, delegation, participation, and coaching.

Conceptual Thinking

The competency of conceiving and selecting innovative strategies and ideas for your organization—a balance between the components of:

- Innovation: The ability to create/enhance ideas, products, and services that lead to bottom-line success.
- Big-Picture Thinking: The ability to see all of the forces, events, entities, and people that are affecting (or are being affected by) the situation at hand.

Systems Thinking

The competency of rigorously and systematically connecting processes, events and systems—a balance between the components of:

- Mental Discipline: The ability to sort through ambiguity and alternatives in a way that crystallizes and puts ideas into action.
- Process Orientation: The ability to increase overall learning and performance by designing, implementing, and/or connecting processes.

While today's program is most relevant to conceptual thinking, having an awareness of your rating in each area provides insight and may make today's program more meaningful. Instructions for completing and scoring the assessment are provided on the following pages.

Purpose and Overview

The purpose of this Leadership Self-Assessment is to provide a leadership profile based on the competencies necessary for strong, superior leadership. The data that you provide will enable you to construct a profile, complete with areas of strength and areas for future development.

Please complete the instrument by assessing your own behaviors and skills according to the directions below. Be honest—the more rigorous you are, the better you can target your developmental needs. Remember, the instrument is meant to assess how you believe that you actually are; not how you think that you should be.

Directions

For each of the 50 items listed on the following pages, consider how much the stated behavior characterizes your own behaviors, thoughts, intentions, or skills in on-the-job situations, and then rate yourself in the space provided according to the following scale:

3 = I often demonstrate this behavior

2 = I sometimes demonstrate this behavior

1 = I hardly ever demonstrate this behavior

Use the enclosed answer sheet (page 33) to record your answers. After recording your answers, add up the totals for each competency and then transfer the overall competency scores to the competency profile sheet on page 34.

Leadership Self-Assessment

1. I balance multiple tasks and prioritize when faced with limited time and/or resources.
2. I create a positive environment—even when it appears “all is lost”—by expressing optimism and offering encouragement to team members.
3. I keep a mental record of every commitment that I make and follow through on my promises.
4. I steer through ambiguity and “information clutter” to resolve complex problems.
5. I ask questions to try to piece together “unrelated” information, events, etc.
6. I build momentum by spending 90 percent of my time on the top 10 percent of my priority list.
7. I view my “wins” with pride and humility.
8. I operate by a value-driven work philosophy that is grounded on clear principles.
9. I adhere to a disciplined process for sorting out alternatives and arriving at the best option when approaching a problem or project.
10. I make connections between and among information, events, etc. that reveal key issues, problems, or opportunities.
11. I display single-mindedness in ceaselessly directing my energy at specific targets.
12. I persuasively and effectively reassure teams and/or individuals in the face of setbacks or seemingly insurmountable obstacles.
13. I identify and find ways to meet the needs, expectations, and wants of others up, down, and across the organization.
14. I test ideas and assumptions by carefully reviewing ideas with thought leaders and critical thinkers within my organization.
15. I do not accept a problem at face value, but search for the less obvious underlying factors driving the problem.
16. I find a way to "get it done" and will sacrifice personally to reach the goal line.
17. I have a thorough understanding of my own emotions and feelings and how they impact the situation at hand.
18. I give people a sense of personal fulfillment by recognizing their individual contributions in the achievement of a goal.

Leadership Self-Assessment continued

19. I consult outside resources (e.g., magazines, databases, etc.) in order to identify where my company, my industry, and the market are moving and to size up new business opportunities.
20. I take into account the potential implications of a decision on other people/departments within the organization before moving forward.
21. I stay the course mentally despite potential distractions and disruptions to my primary focus.
22. I control and selectively display my emotions and feelings in a beneficial way (e.g., I successfully channel my anger).
23. I help build shared goals and values to reinforce individual commitment to the organization.
24. I create viable new business ideas by thinking "out of the box," as well as in a sound business fashion.
25. I build and connect processes within my organization to assure that implementation remains constant and reliable.
26. I display stamina, energy, and intensity in achieving high standards of performance.
27. I express myself in consistent moods that invite participation and further communication with others.
28. I provide honest, clear feedback by focusing on the issue (and not the person) so that the person will accept and consider the feedback.
29. I ask “What if?” questions and play out scenarios to test new business ideas that challenge the status quo.
30. I assure that new ideas are integrated with established procedures/processes so that the organization can digest the new ideas.
31. I act decisively, with a passion for making things happen.
32. I recognize and consider the emotions and feelings of others before taking action.
33. I articulate a goal or vision and motivate others to help me reach that goal/vision.
34. I have the ability to create unorthodox or revolutionary concepts that have growth or profit potential.
35. I create synergy by involving the “right people” in all phases of work design and operational implementation.

Leadership Self-Assessment continued

36. I demonstrate boldness in striving for ambitious goals rather than settling for the safety of achievable results.
37. I treat different people differently, with appropriate amounts of candor and sensitivity depending on each individual's own unique makeup.
38. I create shared responsibility among team members by building participation in decision making and delegating key tasks/functions.
39. I take the time to check whether a new idea is feasible before proceeding.
40. I pull together disparate ideas to create clear themes and pathways that may alleviate the confusion and anxiety of others.
41. I seek—and find—creative solutions to obstacles blocking the path to the goal line.
42. I accept rejection with grace and renewed determination, modeling to others how to handle failure.
43. I display trust in others by giving them additional responsibilities—and providing them with the appropriate tools and resources necessary to carry those responsibilities out.
44. I seek better solutions to problems instead of falling back on established protocol.
45. I demonstrate a commitment to continuous learning by documenting critically important action steps, i.e., I try to make sure that my organization does not “reinvent the wheel.”
46. I effectively communicate the critical nature of the goal in a way that allows others to focus on that goal, as well.
47. I offer solutions, suggestions, and constructive criticism to others while also remaining open to additional possibilities.
48. I successfully help individuals and teams reach higher levels of performance, e.g., by displaying confidence in them at critical junctures.
49. I act receptive to the new ideas of others and try to improve or enhance them in a non-threatening manner.
50. I see an entity (e.g., my organization) not merely as a collection of isolated processes and parts, but as a unitary whole of interconnected processes.

Leadership Self-Assessment answer sheet

Focused Drive	Emotional Intelligence	Building Trust/ Enabling Others	Conceptual Thinking	Systems Thinking
1. ________	2. ________	3. ________	4. ________	5. ________
6. ________	7. ________	8. ________	9. ________	10. ________
11. ________	12. ________	13. ________	14. ________	15. ________
16. ________	17. ________	18. ________	19. ________	20. ________
21. ________	22. ________	23. ________	24. ________	25. ________
26. ________	27. ________	28. ________	29. ________	30. ________
31. ________	32. ________	33. ________	34. ________	35. ________
36. ________	37. ________	38. ________	39. ________	40. ________
41. ________	42. ________	43. ________	44. ________	45. ________
46. ________	47. ________	48. ________	49. ________	50. ________

TOTALS:

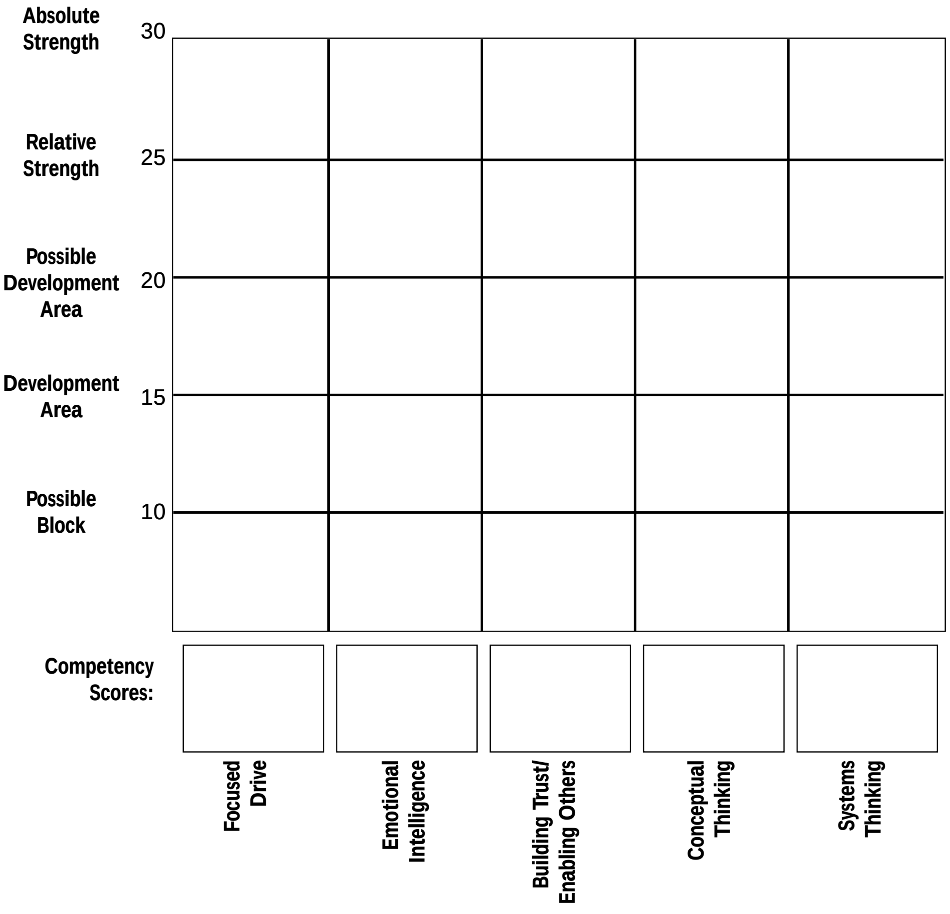
________	________	________	________	________

Individual Development Planning

Leadership Competencies

Competency Profile Sheet

1. Transfer your overall competency scores from the answer sheet to the corresponding boxes below.
2. Plot points on the graph using the scale on the left.
3. Connect the dots to see your overall competency profile.



SECTION 3

Leadership Development Guide

The following activities are excerpts from the Leadership Development Guide, a guide researched and developed by Linkage, Inc. in partnership with Dr. Warren Bennis. These activities were selected because of their relevance to today's program.

Developing the Competency of Focused Drive: The Focus Component

Definition

The ability to identify an important goal or vision and to channel efforts at specific targets that support that goal or vision

Behaviors

- Refuses to let disruptions distract from concentration on a key objective
- Quickly identifies the projects or initiatives that require special attention
- Displays a single-mindedness in directing energy at key targets
- Focuses on key tasks when faced with limited time and/or resources
- Devotes at least 80 percent of time to top 20 percent of priority list

Exercise: Keeping Your Eye on the Ball

1. On a blank sheet of paper, write down your business goals for the next six months or year.
2. Below the goals, write a list of everything you did last week, and how much time you spent on each.
3. For each thing you did, rate its contribution to your goals on a scale of 1 to 5, with 1 being low and 5 being high.
4. Items you rated between 1 and 3 are your “distractors.” Starting with those that took up the largest amount of time, review them and try to identify any patterns. For example, you might find
   – A large number of activities, each taking a little time, but few of which contribute to your goals. This indicates an environment of high distraction and/or that you have acted with little focus.
   – Just one or two activities that take a great deal of time but don’t contribute to your goals. This indicates that you are focusing, but on the wrong things.
5. If there is a pattern in your distractors, what can you do to change this pattern?

Daily Practices

- Every day, week, and/or month, identify a single, significant goal you want to accomplish, and make that your number-one priority.
- Try visualizing as a means to maintaining focus on a key goal: Create an attractive mental image of what things will look like and how you will feel when this goal is achieved. Use recall of this image as a means of staying focused.

  For example, if your goal is an improved or redesigned process, visualize how the organization will function after the change, and try to visualize how good it will feel to work in the new process.
- Every time you are interrupted or offered an opportunity, ask yourself: "Will taking this on help me further my goals?" If the answer is "no," consider declining outright, if possible.
- If you can't decline outright, present the other person with a choice: "I'd like to take this on, but it would prevent me from focusing on goal X. Is that tradeoff acceptable?"
- Periodically complete the "Eye on the Ball" exercise, described on the previous page.

Activities, Assignments, and Projects

- Take on one or more projects in which success relies on exerting a great deal of effort and concentration in a relatively short span of time. Some types of projects that tend to fit this bill include proposals, crisis response, and implementing new processes. These will force you to practice your focus.
- Work with the people who report to you to create a work environment that's more conducive to their focus. Find out what makes it harder for them to focus, whether it's the general work environment or specific behaviors you or others engage in. Then reach clear commitments with them about what will be changed or done differently to enable a higher level of focus.

Readings and Other Self-Study Resources

Covey, Stephen R., *The Seven Habits of Highly Effective People — Powerful Lessons in Personal Change*. Fireside, 1990. This book describes an integrated, principle—centered approach for solving personal and professional problems. Its discussion of the principle "Put first things first" provides concrete suggestions about maintaining focus.

Covey, Stephen R., *First Things First.* Audio Cassette, Covey Leadership Center, 1996. An application of *The Seven Habits of Highly Effective People* and *Principle-Centered Leadership*, this cassette offers a new time management approach based on life values.

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Pascarella, Perry, and Mark A. Frohman, *The Purpose Driven Organization: Unleashing the Power of Direction and Commitment.* Jossey-Bass, 1989. The authors illustrate how organizational leaders can create a framework for making decisions that will unleash company potential for creativity, initiative, and innovation. They give step-by-step methods for uncovering an organization's unique purpose and translating this into a written statement that will provide a clear direction for company policies and strategies.

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provides a specific method for developing a company's strategic vision and putting it into practice.

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Developing the Competency of Focused Drive: The Drive Component

Definition

The ability to persevere, sacrifice (when necessary), and expend high degrees of energy to reach high levels of performance

Behaviors

- Acts decisively to make things happen
- Strives to set and achieve ambitious goals rather than settling for the safety of achievable results
- Overcomes potential stumbling blocks to achieve an objective
- Displays a willingness to do whatever it takes to "get it done"
- Displays stamina and energy over the long term in achieving high standards of performance

Exercise: The Conditions of Drive

1. Describe a time when you were most successful at overcoming obstacles, exerting lots of energy, and/or taking risks to achieve a goal that mattered to you.
   - Why did the goal matter to you?
   - How did you feel about the goal?
   - Were you working with others? If so, what were they like to work with?
   - Were you encouraged and/or supported by others?

- Did you have the resources you needed?
- What else was going on in your life at the time?

2. For each element of the situation that you just described, imagine if things had been different. (For example, imagine that, instead of working with a team, you had to work alone.) For each of these hypothetical situations, ask yourself, "Would I have been as successful if this element were missing?"

   If the answer is "No," you have probably identified a condition that is critical to your ability to drive to your goals.

3. Now, consider a goal you are currently pursuing but having trouble finding "fire in the belly" for. Are the critical conditions you just identified present?

4. If not, what can you do to bring them about? For example, if you have the most drive when working with a team, what can you do to build a team to achieve your current goal?

Exercise: Distilling Your Purpose

This very simple exercise is about getting at your root motivations for work. As you answer the questions, you may find yourself giving answers that have nothing to do with work. That's fine; keep going, taking the exercise as far as you can. You may also find you have more than one answer at certain steps. That's also fine; pursue each "chain of purpose" as far as you can.

1. Answer the question, "Why do I come to work in the morning?"

2. Whatever the answer to #1 is, ask, "Why is that important to me?"

3. Whatever the answer to #2 is, ask once again, "Why is that important to me?"

4. Keep asking the question "Why is that important to me?" until you can't go any further. Your last answer(s) to the "Why?" question is probably your true purpose for work.

5. Reflect on the purpose that you have just "distilled." Ask:
   - Am I comfortable with this purpose?

- Does my work help me achieve this purpose?

6. If your answer to both questions is “yes,” congratulations.

   If your answer to either of these questions is “no,” you may find it difficult to sustain a high level of drive at work. If so, you may need to consider making some significant changes, either in rethinking your purpose or changing your choice of work.

Daily Practices

- Paradoxically, one of the best ways to build drive for achievement at work is to have a rich life outside of work. If you haven’t already done so, you may find that making or renewing a regular commitment to, for example, exercise, community service, religious participation, or a hobby leaves you rejuvenated and sustained for the challenges of work life.
- If you completed either of the above exercises, you probably have some sense of the conditions or purpose that enable you to drive for results. You can use this knowledge to constantly monitor your environment. When you feel your energy flagging, ask yourself whether the right conditions are present or if you are serving your purpose.
- One of the most powerful dynamics that hinders our drive to success is the self-fulfilling prophecy of failure. A self-fulfilling prophecy is any belief, the mere having of which makes it come true. In the case of sustaining drive for results, this works as follows:

  Belief: I want to achieve this, but there are obstacles.

  Conclusion: Given all these obstacles, I’ll probably fail.

  Action: I’ll put less energy into achieving this goal, since I’m probably not going to succeed anyway.

  Outcome: Failure.

  Learning: I’m not good at overcoming obstacles.

  When the self-fulfilling prophecy takes hold, therefore, we can experience a downward spiral in our readiness and ability to drive to success.

  As a daily practice, be aware of your self-fulfilling prophecies. When you find yourself focusing on the risks and obstacles instead of on the opportunities, check to see whether the self-fulfilling prophecy of failure is in effect.

Activities, Assignments, and Projects

- If you've completed the "Conditions of Drive" exercise above, intentionally seek out challenges where just one of these conditions is absent. As you complete the assignment, consciously work on using the enabling conditions that are present to compensate for what is missing. Try to develop "coping strategies" that you can use over the long term in other situations.
- If you've completed the "Distilling Your Purpose" exercise on the previous page and found that the work you're doing does not serve your larger purpose, seek out assignments or projects that are more aligned with this purpose.
- Seek opportunities to work with people who have a large amount of drive, and try to learn what they do to stay motivated and overcome obstacles. Alternatively, select from two to four people whose drive you admire and interview them, seeking to extract the motivations and practices that help them sustain their drive.

Readings and Other Self-Study Resources

Covey, Stephen R., *The Seven Habits of Highly Effective People — Powerful Lessons in Personal Change.* New Jersey: Simon and Schuster, 1994. This book describes an integrated, principle— centered approach for solving personal and professional problems. Its discussion of the principle "Put first things first" provides concrete suggestions about maintaining focus.

"Kye Anderson," *Harvard Business Review*, May 1992. This case illustrates how a person high in results orientation behaves and thinks.

Kushel, Gerald, *Reaching the Peak Performance Zone*, AMACOM, 1994. This book contends that the difference between outstanding work and average work is an internal drive to achieve peak performance. Managers who are peak performers can encourage and teach others how to reach the peak performance zone.

McClelland, David, *The Achieving Society*, Free Press, 1995. This book describes the thinking patterns of the focused— drive competency and its achievement motivation.

Pitino, Rick, *Success Is a Choice*, Broadway Books, 1997. In *Success Is a Choice*, Rick Pitino takes the same proven methods that have earned him and his teams legendary status in the NCAA and gives you a plan of attack for achieving extraordinary success in your own life. He explains how any genuine success must be deserved and then presents a ten-step program for becoming a winner at anything you set your mind to.

Developing the Competency of Trusted Influence: The Commitment Component

Definition

The ability to evoke trust from others by keeping commitments, adhering to high ethical standards and principles, and building shared goals or values

Behaviors

- Motivates others by articulating a clear goal or vision
- Builds commitment by fulfilling/completing what is reasonably expected by peers, reports, and so on
- Praises individual contributions to a collective effort
- Strives to follow through on commitments made
- Helps build shared goals and values to reinforce individual commitment to the organization

Exercise: Keeping a Commitment Log

- Keep a log of all commitments you make—both large and small—over the course of a week. (You'll probably be surprised at how many you make every day.) For each commitment, record whether you kept it, missed it, or fulfilled it late. If it was missed or fulfilled late, record the reason this happened.
- Determine the percentage of commitments you are able to keep. Continue the log, trying over time to increase the percentage of commitments kept.
- Review the reasons for missed or late commitments, and try to determine whether there are common causes for the missed commitments. (Typical causes include overcommitting, committing under duress, underestimating time or difficulties, lack of resources, and changing circumstances.)
- If there is a common cause or causes, seek to address the causes directly or to anticipate them the next time you consider a commitment.

Exercise: The Missed Commitment

1. Think about a commitment that someone recently made to you, but didn't meet.
   - What did the person commit to?
   - Why do you think he or she failed to meet the commitment?

2. Now, recollect the conversation you had at which the commitment was made.
   - Did you express the request clearly, especially in terms of specific requirements that had to be met?
   - Did you ask for specific milestones, deadlines, delivery dates, and/or completion dates agreed to?
   - Did you ask what support he or she needed from you or others?
   - Did you check to see how he or she felt about making the commitment (e.g., confident, overwhelmed, stressed, excited)?

3. The quality of the conversation in which a commitment is made is the single most important factor in whether the commitment is met. If you answered "no" to any of these questions, you may have some share of responsibility for the missed commitment.

4. Next time you have a "conversation for commitment" with one of your colleagues, be sure to address these four issues:
   - Specific requirements that need to be met
   - Specific milestones, deadlines, delivery dates, and/or completion dates
   - Support needed from you or others
   - How they feel about making the commitment (e.g., confident, overwhelmed, stressed, excited)

Exercise: Building Shared Goals and Values for Daily Practices

Open your daily planner and rephrase meetings and appointments as commitments. That is, what are you committed to delivering on or producing in these situations? What quality requirements can you attach to these commitments that will ensure that you delight your customers and colleagues?

For example, replace the words "Project Meeting at 9:00 a.m." with the words "Produce project status report and vendor profiles to bring to 9:00 a.m. meeting."

Exercise: Building Shared Goals and Values

1. Leave five minutes at the end of your next team meeting for this exercise.
2. Explain that you are interested in determining the extent to which the team/organization has built shared goals and values. Ask each team member to record on paper a succinct response to the question: "What would you say are the goals and values of this team/organization?" Write a response of your own along with your team members.
3. Collect the responses. Promise to summarize the responses and present the results at your next meeting.
4. Study the results to determine the extent to which you have been able to build and instill shared goals and values in your team/organization. Based on your findings, determine the degree of your success in articulating and building shared goals and values.

Daily Practice

- At the start of every day, identify three things you will do to reinforce for others the importance of the organization's goals and values. Avoid doing so by giving "heroic" speeches or sending out memos; rather, try to integrate the message into your daily work. Examples of what you might do include:
- When you give people assignments or projects, explain the reason for the assignment and how completing it will contribute to meeting the organization's goals.
- Reduce the amount of time you spend "fighting fires" or dealing with crises.
- When you see others behaving inconsistently with the organization's goals and values, give them feedback immediately. Do so, however, in a manner that emphasizes learning and change rather than punishment.
- When planning for any significant objective, spend plenty of time identifying whom you must get support from and how you can most effectively influence them. Until this becomes second nature, it is a good idea to outline the steps you will take and what you will communicate in your approach to all the key players. Review and follow this influence plan as you proceed to accomplish your objective.
- Tell stories about people (especially people in your organization) who have lived up to challenging commitments. Emphasize the value of living one's commitments. Tell these stories on both informal and formal occasions.
- Often, missed commitments are due to how the commitment was made, rather than to the failure of execution. When making a commitment to others, or receiving a commitment from others, ask:
  - Are the quality requirements for meeting the commitment clear?

  - Are there specific milestones, deadlines, and completion dates?
  - Does the person or group have the support they need to meet the commitment?
  - Does everyone feel good enough about the commitment to devote the energy necessary for meeting it?
- If the answer to any of these is “no,” address the issue before the commitment is finalized. It’s always better to make the effort to create a solid commitment than to make the effort to recover from a missed commitment.
- Follow up on all commitments made to you by others, whether they have been met or missed. If the commitment has been met, thank and/or recognize the person who met it; if it has been missed, address the issue directly. Failure to follow up on others’ commitments sends a message that you (and your organization) do not value meeting commitments.

Activities, Assignments, and Projects

- Develop an idea that requires others’ commitment in order to succeed, such as improving a process or exploring a new business opportunity. Create a compelling vision for the idea, present it to others, and try to gain their commitment and support.
- Outside of work, join an organization that does advocacy and outreach work, whether in support of religious, social, political, or other causes. Observe the strategies and tactics it uses to build support for its views, and seek opportunities to participate in its advocacy and outreach work.
- Observe a person who is particularly effective at gaining commitment from others. Ask yourself (and them) questions such as:
  - What techniques does this person use?
  - How does this person deal with roadblocks to gaining commitment?
  - How does he or she state his or her arguments?
  - What in particular appeals to you when you listen to this person?
- From your observations, experiment with some of the effective techniques and see how they work for you.

Readings and Other Self-Study Resources

Cohen, Allan C., and David L. Bradford, *Influence Without Authority*. John Wiley & Sons, 1990. The authors offer powerful new techniques for cutting through interpersonal and interdepartmental barriers and for motivating people over whom you have no authority in order to maximize valuable time and resources.

Covey, Steven R., *The Seven Habits of Highly Effective People—Powerful Lessons in Personal Change*. Simon & Schuster, 1994. This book presents a holistic, integrated, principle-centered approach for solving personal and professional problems. With insights and anecdotes, the author reveals a step-by-step guide for living with fairness, integrity, honesty, and human dignity—principles that provide the security needed to adapt to change, and the wisdom and power to take advantage of the opportunities that change creates.

Handy, Charles, "Trust and the Virtual Organization," *Harvard Business Review*. May/June, 1995. How do you manage people whom you do not see? The author believes that this managerial dilemma can be corrected with "trust," since the rules of trust are both obvious and well established. This apparent simplicity disguises a turnaround in organizational thinking because efficiency and control are closely linked—you can't have one without a lot of the other.

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Kinlaw, Dennis, *Coaching for Commitment*, Pfeiffer and Company, 1989. Presents a practical, tested approach for coaching people to commit to higher levels of performance.

McGinnis, Alan Loy, *Bringing Out the Best in People*, Augsberg Publishing, 1991. The author based the principles of this book on his research of great leaders throughout history, highly effective organizations, and the input of many prominent psychologists. Through case studies and anecdotes, this book shows how to put 12 key principles to work to inspire, motivate, and persuade others.

Robbin, Anthony, *Personal Power*, Gunthy Renker Corp., 1992. This book looks at the transformational power of making "unattainable" commitments and living your word.

Wilson, Thomas, *Innovative Reward Systems for the Changing Workplace*, Jossey-Bass, 1996. As a leading pioneer of the innovative "Reward Smart" model, Thomas Wilson has helped a large number of progressive companies change from a reward system based on old notions of competition and combat to one grounded in new paradigms of collaboration and teamwork. Learn how to develop a portfolio of high-impact reward programs to identify pay alternatives, enhance commitment, promote a spirit of collaboration, and attract more talented people to your organization.

Developing the Competency of Trusted Influence: The Empowerment Component

Definition

The ability to help others reach higher levels of performance through trust, delegation, participation, and coaching

Behaviors

- Displays trust in others by giving them additional responsibilities
- Displays confidence in individuals by delegating key tasks/functions
- Provides clear feedback by focusing on the issue and/or behavior (not the person)
- Creates shared responsibility by building participation in decision making
- Takes steps to make sure that others have the tools/resources necessary to fulfill their roles and responsibilities

Exercise: The Leadership/Technical Split

As a leader, you will be successful to the extent that you can free yourself from the "technical" work of your unit by giving those you lead the skills, resources, and "space" to take this work on.

1. List all your activities in a given day or week, along with the time spent on each.

2. For each activity, identify whether it is a "leadership" or "technical" activity.
   - A "leadership" activity is one that organizes or enables the work of the people you manage, such as planning, budgeting, or coaching.
   - A "technical" activity is one that involves performing the tasks that produce outputs for your unit's customers.

3. Consider the technical activity that takes up the largest part of your time.
   - Why aren't the people you lead doing this work?
   - Are there any reasons why they can't currently do this work?

- What can you do to help them take on more responsibility for this work?
- What are the short-term costs and risks of giving them this responsibility?
- What are the long-term payoffs, and do they outweigh the risks?

4. If it makes sense to do so, create a plan for how you will provide those you lead with the skills, resources, and space to take on this work.

Exercise: Expanding Your Decision-Making Options

One powerful step you can take is to involve people in decision making about issues that affect them. This is not an either/or situation, where either you make the decisions or someone else does. Rather, there is a spectrum of possibilities for reaching decisions:

You may complete this exercise either for an individual you lead or for the group that reports to you.

1. List the decisions you currently make that affect the individual or group.

2. For each decision, describe how it is made.

3. For each decision, describe the readiness (expertise and maturity level) of those affected to become involved in the decision.

4. Based on this work, for each decision assess whether you're using the appropriate decision-making approach. If not, identify a more appropriate approach to use in the future.

Daily Practices

- Discourage others from relying on you to solve their problems. Make yourself available, but encourage them to approach you only once they are ready to give:
  - A clear statement of the problem as they understand it
  - The options they believe are available
  - A recommended option and the reasoning for selecting that option

- If you disagree with their thinking, don't criticize them or reject it out of hand. Rather, encourage them to explore the options further, asking questions such as, "Have you considered other options?" or "What would happen if . . . ?"
- Constantly seek ways to increase the amount of information your employees receive, their degree of involvement in decision making, and their accountability for results. One way to do this is to change the questions you ask yourself.
- If you don't already do so, make it a practice to ask those you lead how much information, involvement, and accountability they would like to have.
- Increase the amount of feedback you give others—both for successful and unsuccessful performance.
- Be conscious of how you deliver the feedback, especially regarding mistakes or failures. If you tend to criticize, punish, and/or take things over, try instead to use these situations as opportunities for learning.
- This is a way of structuring conversations so that people are given a chance to "vent" (in "the swamp"), but then are encouraged to think through the situation and come to a resolution about next steps.

Activities, Assignments, and Projects

- Volunteer to lead projects with unusually difficult time frames and deadlines. This will put you in a situation where success will require you to delegate responsibility to others.
- Participate on a team charged with improving or reengineering a process. Such work almost always involves identifying roadblocks or inefficiencies that can be remedied by empowering people on the line to make more decisions and take on greater accountabilities.

Readings and Other Self-Study Resources

Bellman, Geoffrey M., *Getting Things Done When You're Not in Charge*. Fireside, 1993. Bellman helps the consultant who does not have any formal power in an organization, to help others gain success and create change. He focuses on developing leadership skills, gaining empowerment, understanding organizational politics, and creating change. He provides refreshing ways to think of "internal customers" and offers a lot of practical information to use in daily work.

Blanchard, Ken, *Empowerment Takes More Than a Minute*. Berrett-Koehler, 1996. This book explains how to empower the workforce by moving from a command-and-control mindset to a supportive, responsibility-centered environment in which all employees have the opportunity and responsibility to do their best.

Block, Peter, *The Empowered Manager.* Jossey-Bass, 1990. In this book, Block shows managers how to break out of the bureaucratic mode of thinking and take more responsibility for the workings of their unit. He explains how managers can become empowered to make positive changes in their organization and develop an entrepreneurial spirit in themselves and in members of their unit.

Hersey, Paul, *The Situational Leader.* Warner Books, 1985. The author provides a brief guide, based on the situational leadership model, that describes how to develop people and effectively utilize human resources.

Kelly, John and James Jenks, *Don't Do—Delegate!* Ballantine Books, 1994. This book is full of tips and techniques to help you manage your job, rather than have your job manage you. Explore how to effectively make assignments, how to decide who will get the job done, overcome obstacles, build trust, and coach.

Kushel, Gerald, *Reaching the Peak Performance Zone.* AMACOM, 1994. This book contends that the difference between outstanding work and average work is an internal drive to achieve peak performance. Managers who are peak performers can encourage and teach others how to reach the peak performance zone.

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McLagan, Patricia, and Christo Nel. *The Age of Participation.* Berrett-Koehler, 1995. The Age of Participation focuses on participation in the workplace, blending theory and practice in numerous examples and industry models. Specific attention is given to values, competencies, leadership, and organizational structures.

Developing the Skill of Coaching/Mentoring

Definition

The skill of mastering a comfortable coaching style and using it strategically to improve performance

Behaviors

- Can use a variety of methods (reason, inspiration, and so on) to help individuals attain higher levels of performance
- Can help others recognize their areas of weakness in a constructive, beneficial manner
- Can identify and confront critical developmental issues/barriers with respect to peers, reports, and so on
- Can instill a sense of confidence in others—even those who are convinced that they "can't do it"
- Can help others work their way through problems or crises

Exercise: Identifying Your "Coachable Moments"

While all too often we think of coaching in terms of formal, sometimes lengthy, sit-down sessions, coaching need not take on these characteristics. In fact, coaching is often best accomplished in small doses by seizing the daily opportunities that present themselves all the time. The following steps will help you begin to recognize these opportunities more easily.

1. List those opportunities or moments that occurred over the past day or two that provided you the chance to coach. For example, consider your diverse formal and informal interactions and conversations with teams, individual direct reports, peers, and those to whom you report.
2. List those additional opportunities to coach that present themselves to you on a regular or occasional basis. For example, consider regular team meetings, performance reviews and development planning meetings, telephone, voicemail and e-mail interactions, and occasional lunches or travels with those whom you support.

This list should help you see just how many (and varied) your coaching and mentoring opportunities are. Some people refer to these opportunities as "coachable moments." Part of really shifting to a coach's mindset is to heighten your awareness of all the many coachable moments available to you. Commit to actively and

consciously practicing and applying your coaching and mentoring skills by seizing your particular “coachable moments”.

Daily Practices

- Provide regular, quality feedback to others about their performance, whether the feedback is positive or negative. Follow these guidelines to maximize the possibility of learning:
  - Provide feedback in a timely manner.
  - Focus on the observed behavior or performance, not on the characteristics of the person.
  - Explain the consequences of the behavior or performance: How does it impact you, the team, and/or the organization?
  - Allow the other person time to process and respond to the feedback.
  - If you both agree that there is an opportunity for improvement, seek commitment to behavior change or development actions.

- Conduct "after-action reviews:" such reviews, also called "debriefs" or "post-mortems", are a highly effective, standard practice in many organizations (including the US Army, where the practice has become systematized and is credited with major improvements in organizational learning).
- After-action reviews can be conducted following surprising successes, failures, or disappointments in order to ensure that the learnings are captured and transferred to future work. A review can be structured using the following steps:
  1. Invite individual and team expressions of feelings and gut reactions.
  2. Ask for a recap of action and agree on facts.
  3. Diagnose the cause(s) of success or failure. Find the lesson.
  4. Commit to applying this lesson going forward and transferring it to others in the organization where appropriate.

- The final step emphasizes the importance of "institutionalizing" whatever is learned during these sessions. You might do this through issuing a memo, revising a policy, instituting new SOPs, and so on.

- The best coaching and mentoring takes place inside a partnership for mutual learning. Partnerships are marked by two-way dialogue and by a spirit of openness that includes the free flow of information, ideas, and feelings. Commit to gaining greater awareness of this critical element of partnership through the following simple means.

  1. Measure the percentage of "talk time" in your interactions with those you coach. You can estimate this mentally following a conversation. You might also ask the person with whom you've spoken to give you their estimates of how much each of you spoke during the interaction. Too often, leaders and managers discover that they dominate the talk time. If you find the balance of talk unequally tilting your way, work on shifting that balance over the course of several conversations, either with the same individual or with different individuals. The best and simplest way to do so is by posing thoughtful, open-ended questions that invite quality responses from the other person.

  2. Pay attention to the degree to which you are directive or supportive in your coaching. When you direct, you take the leading role, imparting information, delivering solutions, and determining the course of action. When you support, you are a guide or facilitator, helping others to accomplish tasks, find their own solutions, and target their own performance improvement and development options. While the best coaches mix their approaches, adapting to the situation and the person being coached, in general, a more balanced or supportive approach invites greater participation and promotes partnership.

Activities, Assignments, and Projects

- Volunteer to provide formal, ongoing one-on-one coaching to two or more people who are in different situations. For example, you might coach someone who is considered a high performer and someone who is not performing up to expectations.
- Make a list of the many ways you can recognize those you coach. Recognition possibilities fall into three categories: 1) gestures and personal acknowledgements (such as a handshake, a request for advice or opinion, or a thank you to a team at the start of a meeting; 2) supportive actions and responses (such as giving someone a choice assignment, negotiating a flexible work schedule, or responding quickly to a request); 3) tokens of appreciation (such as a thank you memo, a group photo, or a dinner gift certificate.
- Look over your list and select two or three for you to commit to using in the next week or on a regular basis. Or, consider the personality of each person you coach and select the recognition strategy that you believe suits each one best.

- Take on a coaching role outside the workplace. For example, you might coach a team in a youth sports league, tutor school children, or volunteer as a literacy trainer for adults.
- Identify one or more people whom you coach who would most benefit from a developmental "stretch" assignment—that is, one that helps the person step out of their comfort zone and offers a challenging but achievable goal. For example, the assignment might require of them a little more responsibility, proficiency, skill, knowledge, or technical know-how than they are used to, or may ask them to work with new people or in an area of the business with which they have little or no experience. Be sure to check in with them regularly and to hold a debrief session following their completion of the assignment.

Readings and Other Self-Study Resources

Argyris, Chris, "Teaching Smart People How To Learn." *Harvard Business Review*, May/June 1991. In this article, the legendary Harvard Business School professor looks at human behavior patterns that block learning in organizations, explains why well-educated professionals are prone to these patterns, and tells how companies can improve the ability of their managers and employees to learn.

Aubrey, Robert, and Paul M. Cohen, *Working Wisdom*. Jossey-Bass Publications, 1995. Making sense of accumulated knowledge is called wisdom, and the teaching of wisdom requires an ongoing, active, one-on-one relationship between teacher and learner. Managers can help make learning happen through what the authors call the five skills of wisdom: accompanying, catalyzing, sowing, showing, and harvesting.

Bower, Marvin, *The Will to Lead: Running a Business with a Network of Leaders.* Harvard Business School Press, 1997. Raising serious questions about "command-and-control" leadership, the author urges the creation of companies based on networks of leaders and leadership teams. Weaving in stories and lessons from his own journey, he outlines the first steps for making it happen.

Gilley, Jerry, *Stop Managing, Start Coaching!* McGraw Hill, 1996. In today's dynamic work environment, managers must assume a number of non-traditional responsibilities. This book highlights a critical skill they must manage—performance coaching. Today's manager must motivate, inspire, and train employees so that they can perform to the best of their abilities. This book illustrates how effective performance coaching not only enhances employees' careers, but increases their productivity and commitment to the organization.

Hargrave, Robert, *Masterful Coaching.* Pfeiffer and Co., 1995. Masterful coaching emphasizes core coaching skills—sponsoring, counseling, acknowledging, teaching, and confronting. The author provides examples of breakthrough results from leading companies.

Hendricks, William, and Franklin Jakes, eds. *Coaching, Mentoring, and Managing: Breakthrough Strategies to Solve Performance Problems.* National Press Publications, 1996. Featuring the expertise and wisdom of eight of America's most renowned experts on coaching and counseling, this text teaches readers how to be winners and how to teach others to be winners. Learn to tap the hidden strengths in each person on a team, be a coach who inspires peak performers to even greater productivity, mentor employees to move them from good to great, prevent team problems before they happen, and much more.

Kotter, John P., "What Leaders Really Do." *Harvard Business Review*, May/June 1990. Leadership and management are two distinctive and complementary systems of action, each with its own function and characteristic activities. Both are necessary for success in today's business environment. According to the author, successful corporations don't wait for leaders to come along—they actively seek out people with leadership potential and expose them to career experiences designed to develop that potential.

Kushel, Gerald, *Reaching the Peak Performance Zone.* AMACOM, 1994. This book contends that the difference between outstanding and average work is an internal drive to achieve peak performance. Managers who are peak performers can encourage and teach others how to reach the peak performance zone. Peak performers are self-motivated people who freely accept the blame when things go wrong and who work energetically simply because they want to. The author provides a step-by-step method for motivating others to become peak performers.

Miller, James B., and Paul B. Brown, *The Corporate Coach: How to Build a Team of Loyal Customers and Happy Employees.* Harper Business, 1994. The authors liken running a successful company to coaching a winning team. Their book shows how to empower people at every level and give them opportunities to develop, improve, and be creative.

Peterson, David B., and Mary Dee Hicks, *Development First: Strategies for Self-Development*. Personnel Decisions International, 1995. This book contains practical approaches to individual and team development within the changing corporate environment. Its five concise development strategies enable users to plan and execute their own development in a busy, demanding world.

SECTION 4

Forms and Sponsors

Creating a World-Class Organization

Question sheet

Use this form to write your question for Ken Blanchard or for discussion among your colleagues. Please write clearly.

Name (optional) ______________________________

Organization ______________________________

Location ______________________________

Your question (25 words or less):

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801-303-7412 (from outside U.S.)

Fax 1-877-892-0170 (from within U.S.)
646-349-3661 (from outside U.S.)

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Please indicate functional area (only circle one):

Finance Human Resources Manufacturing/Operations Marketing R&D Sales Other (specify)_________________

How many people do you have reporting to you (include all levels)? Number:___________________

Please indicate your job level (only circle one):

❑ President or Officer ❑ Vice President or Director ❑ Manager/Supervisor ❑ Team Leader ❑ Sales Rep.

❑ Customer Service Rep. ❑ HR, T&D, OD Practitioner ❑ Other: ____

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1) Please indicate a rating for each of the following evaluation criteria by checking the appropriate box.

	Strongly Disagree	Somewhat Disagree	Somewhat Agree	Strongly Agree
Length of Presentation	❑	❑	❑	❑
Effective presenter	❑	❑	❑	❑
Useful participant materials	❑	❑	❑	❑
Current Important Topic	❑	❑	❑	❑
Useful question and answer	❑	❑	❑	❑
Live (versus taped) broadcast important	❑	❑	❑	❑
Other______________________	❑	❑	❑	❑

2) Please give a general overall comment about the program. ____

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3) Can Linkage use this comment for promotional purposes (including name and organization)? **YES** **NO**

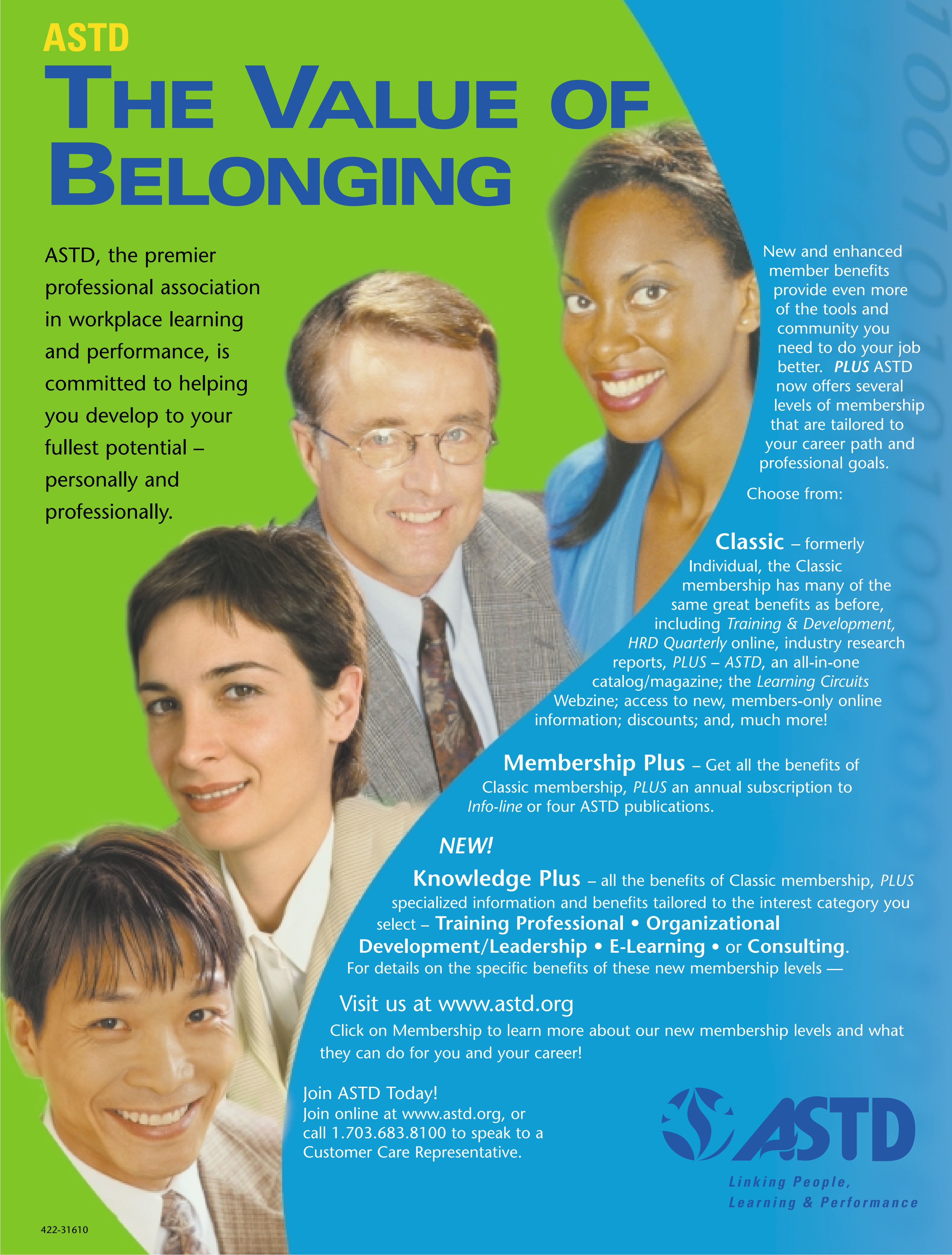
4) On a scale of 1-10 (10 = Outstanding), how would you rate this satellite broadcast session? Rating:________________

5) How many viewers would you estimate attended this event (in the room with you)? Number:_____________________

6) Which speakers are you most interested in seeing at the next Linkage Satellite (Distance Learning) Learning Series?
(Please rate your top ten, "1" being most interested, "10" being least interested)

___ Peter Senge
___ Warren Bennis
___ Colin Powell
___ Margaret Wheatley
___Francis Hesselbein
___Michael Hammer
___Gary Hamel
___ Michael Dell
___ Clayton Christensen
___ Don Tapscott
___Michael Porter
___Regis McKenna
___Noel Tichy
___James Champy
___ Spencer Johnson (author, Who Moved My Cheese)
___ William Bridges
___ Nicholas Negroponte
___ Tom Peters
___ Geoffrey Moore
___ Andy Grove
___ Bill Gates
___Other____

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